

## Suggested Training Plan Outline

Introductions	Introduce yourself and find out a little about the audience; i.e. job roles, schools represented, etc.
Background of the project	The SRSD/UIC application is a part of the CEPI student database application for all students in Michigan. It was designed to resolve discrepancies in the student data resulting from possible duplication of student entries. In some instances it is not clear whether multiple records may represent a single student. This application will help to resolve those possible matches.
Training purpose	The purpose of the SRSD/UIC training is to familiarize local district staff with the new application so they can in-turn resolve any possible discrepancies in their data.
Review materials	Review and explain the materials you are distributing for the training: <ul style="list-style-type: none"><li>• Application User's Guide</li><li>• FAQs</li><li>• List of Roles</li><li>• Timeline for submissions</li></ul>
Vocabulary	Do a quick review of some of the most relevant terms in the glossary, such as core fields, positive matches, possible matches, and unique identification code. (Found in the back of the Application User's Guide.)
SRSD/UIC Roles	Review briefly, the various roles played in the management of the SRSD/UIC: Resolver, District Internal Account Administrator (DIAA), SRSD Uploader, ISD FTE Auditor. These role descriptions are found on the handout "Roles."
Section 1 of the Application User's Guide: Phase 1 – Student UIC Resolution	Follow the Application User's Guide and the PowerPoint slides very closely to explain Phase 1 of the application making sure to highlight the following steps: <ul style="list-style-type: none"><li>• Purpose</li><li>• Uploading batches</li><li>• Viewing uploaded batches</li><li>• Checking batch status – step 1</li><li>• Batch summary screen – step 2</li><li>• Data errors</li><li>• Checking the match list – step 3</li><li>• Match resolution – step 4</li><li>• Create new UIC or Use This UIC</li><li>• Matching strategy</li><li>• Core fields and Helper fields</li></ul>
Review	Give participants a few minutes to review Phase 1.
Section 2 of the Application User's Guide: Phase 2 – Duplicate UIC Resolution	Follow the Application User's Guide and the PowerPoint slides very closely to explain Phase 2 of the application, making sure to highlight the following steps: <ul style="list-style-type: none"><li>• Purpose</li><li>• Duplicate UIC Resolution screen</li></ul>

	<ul style="list-style-type: none"> <li>Click on UIC to get record to resolve</li> <li>Determine whether it is the correct match or if a new UIC should be assigned, or Do Not Submit if it was submitted in error</li> </ul>
Review	Give participants a few minutes to review Phase 2.
Scenarios	Assign one of the eight scenarios on pages 13-15 of the Application User's Guide to pairs or triads of workshop participants. Ask them to review the scenario and explain it to the rest of the group. (This serves as a review of both Phase 1 and Phase 2 and increases understanding.)
Section 3 of the Application User's Guide: Generate Reports/Download UICs	<p>Follow the application User's Guide and the PowerPoint slides very closely to explain Section 3 of the application, making sure to highlight the following steps:</p> <ul style="list-style-type: none"> <li>Purpose</li> <li>Click on UIC Reports link</li> <li>Select the kind of report desired – PDF List or Text File Export/Download</li> <li>Choose ISD from drop-down list</li> <li>Select the batch to report on or select all</li> <li>Submit</li> <li>Review the kinds of reports available and give the participants an opportunity to explore them online.</li> </ul>
Section 4 of the Application User's Guide: Student Search	<p>Follow the application User's Guide and the PowerPoint slides very closely to explain Section 4 of the application, making sure to highlight the following steps:</p> <ul style="list-style-type: none"> <li>Purpose</li> <li>Student search screen</li> <li>Enter the appropriate data (UIC or Core Data) &amp; search</li> <li>Check results</li> <li>Sort columns</li> <li>Open details of the record</li> <li>Go back to Search screen if an action is required to correct the record</li> <li>Create New UIC or</li> <li>Link UICs or</li> <li>Unlink UICs</li> </ul>
Review	Give participants a few minutes to review the Student Search section.
<p>Section 5 of the Application User's Guide: Upload for UIC Request</p> <p><i>Note: The data uploaded in this section are not in the same format as the regular SRSD submissions and the LEAs may</i></p>	<p>Follow the Application User's Guide and the PowerPoint slides very closely to explain Section 5 of the application, making sure to highlight the following steps:</p> <ul style="list-style-type: none"> <li>Purpose</li> <li>Upload for UIC Request = NonSRSD Batch</li> <li>Batch File Upload for UIC Request screen</li> <li>Select ISD and district</li> <li>Browse button to locate your data for upload</li> </ul>

choose to upload their new kindergarten students during the regular fall submission cycle.	<ul style="list-style-type: none"> <li>• Your e-mail address for notification</li> <li>• Submit</li> <li>• Check Batch Status List</li> <li>• Check NonSRSD Batch Summary</li> <li>• Non SRSD Batch File Layout</li> </ul>
Review	Give participants a few minutes to review Upload for UIC Request.
Section 6 of the Application User's Guide: Give Users Accounts	<p>Follow the Application User's Guide and the PowerPoint slides very closely to explain Section 6 of the application, making sure to highlight the following steps:</p> <ul style="list-style-type: none"> <li>• Purpose</li> <li>• Search for Users</li> <li>• Users List Screen</li> <li>• Enter appropriate data</li> <li>• Select desired action</li> <li>• Search button &amp; view results list</li> <li>• Reset Criteria for new search</li> <li>• Create New User – Individual must be notified of rights and responsibilities &amp; a MEIS account must be set up if he/she doesn't have one.</li> <li>• Click on Create New User link &amp; enter appropriate data.</li> <li>• Save User</li> <li>• Search for new user and select User Roles</li> <li>• Edit User</li> </ul>
Review	Give participants a few minutes to review Give User Accounts.
How to get additional help	<p>Make sure participants know where they can get help after they leave the training session.</p> <ul style="list-style-type: none"> <li>• Application User's Guide</li> <li>• The Help function within the application includes a tutorial explaining how to perform each action.</li> <li>• DIT Client Service Center: E-mail: <a href="mailto:Help-Desk@michigan.gov">Help-Desk@michigan.gov</a> Phone: 517-335-0505</li> <li>• ISD staff</li> <li>• CEPI website: <a href="http://www.michigan.gov/cepi">www.michigan.gov/cepi</a></li> </ul>
Q & A and any closing issues that need to be addressed.	
Adjournment	

**Notes to Trainers:**

1. Trainers should plan on proceeding with a paper-based training method. Combining the PowerPoint presentation with the User's Guide will allow you to walk participants through the resolution step-by-step. The User's Guide and FAQs also present common issues in the resolution process and provide suggested solutions.
2. Encourage participants to raise questions as they occur throughout the training session and to help each other whenever possible.
3. Also see the "UIC Tips and Information for Trainers" for additional information.
4. To find the SRSD Application on the CEPI website:  
<http://www.michigan.gov/cepi>. Click on MEIS Data Services. At the next screen, click on Single Record Student Database on the left navigation bar. Then at the next screen, click on the SRSD/UIC Application (in the pink box).
5. To find the training documents on the CEPI website:  
<http://www.michigan.gov/cepi>. Click on MEIS Data Services. At the next screen, click on Single Record Student Database on the left navigation bar. See SRSD Help Section for the Application Users' Guide, the FAQs and the UIC Timeline for Spring 2004.